Author and Editor Guide

This User Guide gives CA Web Publishing users assigned to the Author and Editor roles the necessary information to begin creating and editing site content using the Page Editor.

Information related to the Site Administrator's role and the use of the Content Editor is not included here but is covered in the CA Web Site Administrator's Guide.

CA Web Publishing Author and Editor Guide

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1 Preamble

1.1.1 Version History

Date	Version	Description	Author
9/18/2015	1.0	Initial, Pre-pilot	Felicia Armelin
10/12/2015	1.1	Pilot Release, major re-write	Kevin Paddock
1/8/2015	1.2	Pilot Release, extensive updates	Ryan Vollmer
2/1/2016	1.3	Phase 1 Release, Updates	Kevin Paddock

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2   Overview

This document is the preliminary user manual for customers of the CA Web Publishing Service (CAWeb) and includes information with which a typical user must be familiar, from logging into the system to editing and managing website content. This is not a comprehensive user manual; however the concepts explained here are useful for new users and as a reference for intermediate users.

2.1   System Requirements

Editing a CA Web Publishing website is best performed on Desktop PCs. Though the sites created using CA Web Publishing are responsive and accessible, the authoring environment is not responsive and may not work as expected on mobile devices and tablets.

2.1.1   Supported Web Browsers

CA Web Publishing supports the following web browsers:

- Microsoft Internet Explorer 9, 10, and 11
- Microsoft Edge
- Mozilla Firefox 17 and later
- Google Chrome 25 and later
- Apple Safari 6 for Mac OS

2.1.2   Configuring CA Web Publishing for Internet Explorer
1. Ensure that only one instance of **Internet Explorer** is open.
2. Use the Tools | Internet Options | Security tab to configure the **Trusted Sites** zone:
   - Add "https://portal.caweb.ca.gov" to the Internet Explorer Trusted Sites zone
3. Disable the Pop-up Blocker

Note: The Internet Explorer Compatibility View mode is not supported.

2.1.3   Other Browsers
Other supported browsers do not require any specific configuration settings.

3   Roles

3.1   Author

The Author role includes permissions to add and edit content but not publish. While Authors can remove components from a page they cannot delete pages or content items. Authors submit changes and Editors (or Site Admins) approve them for publication. Authors can be assigned to a business area/unit.

3.2   Editor

The Editor role has all the rights of the Author role including permissions to write, edit, delete. Editors may delete pages and content items in addition to components. The Editor role can also approve all content changes for publication, including that of other Site Admin, Editor and Author content submissions. Editors can be assigned to a business area/unit.

3.3   Site Administrator

The Site Administrator role includes the ability to perform the following functions: configure site-wide settings, edit home page content (including banner images and footer links), create and manage user accounts and fully utilize the version control feature. In addition to these administrator specific permissions, Site Admins possess all the rights of the Editor role. See the Site Administrator Guide for detailed information about site administration and the use of the Content Editor.

This table shows a comparison of the functionality available to each role:

	Admin	Editor	Author
Create/ Edit Content Items	✔	✔	✔
Add/ Remove Non-Home Page Components	✔	✔	✔
Submit Content For Approval	✔	✔	✔
Delete Content Items	✔	✔	✘
Approve Content Submissions	✔	✔	✘
Configure Site Settings	✔	✘	✘
Add/ Remove Home Page Components	✔	✘	✘
Create/ Edit User Accounts	✔	✘	✘

4   Logging In

URL's for CA Web Publishing login pages:

Production: https://portal.caweb.ca.gov/sitecore/login/

4.1   Username

Usernames must follow a specific naming convention. A username has two parts: 1) a domain indicator and, 2) a unique first and last name separated by a backslash character ("\"). For example, in the username `caweb\ryanvollmer`, the domain name is `caweb`, and unique name is `ryanvollmer`. All references to usernames include both parts. Each CA Web Publishing customer site has a unique domain name which is usually the site's acronym. Customer site administrators are responsible for creating user accounts following this naming convention. Please note that CA Web Publishing Service on-boarding team will create an initial set of user accounts to be delivered to the customer prior to the training class or site release.

> Also note that usernames are not case-sensitive but passwords are case-sensitive.

4.2   Password Reset and First Time Login

For first time logins a password reset is required.

Step 1: On the login page click *Reset My Password*.

Step 2: Enter your username in the *User Name* field.

Step 3: Click *Submit*.

Step 4: Find the email from noreply@state.ca.gov with the subject "Sending Per Your Request". A temporary password is provided in this email.

⚠️   If you are not able to find the email check your SPAM or Junk folders.

To finish logging in change your password (4.3 –Password Changes) and perform a normal login (4.4 – Normal Login).

4.3   Password Changes

Step 1: On the login page click ***Change My Password***.

Step 2: Fill out all the fields.

Password will be the temporary password received in an email if ***Reset My Password*** was used.

Step 3: Click ***Change Password*** to change your password and return to the login screen.

4.4   Normal Login

Step 1: On the login page fill out the ***User Name*** and ***Password*** fields.

Step 2: Click ***Login*** to be redirected to the ***Page Editor.***

Note the checkbox for remembering the username.

4.5   Concurrent Users

CAWeb CMS Service subscriptions allow for an unlimited number of usernames; however, the base rate allows for 1 user logged in at a time. When a second user (or Site Administrator) tries to log in to a site configured for 1 concurrent user session, the following error message is display: "**User cannot be logged in as the maximum concurrent user threshold has been reached for this subscriber**." To purchase an upgrade for additional concurrent users, contact your CDD Account Lead.

4.6   Password Standards

The following password policy is enforced by the CA Web Publishing Service:

- Must be 8 characters minimum
- May not contain your login user name or any part of your full name
- May not contain alpha or numeric representations of calendar months or years
- Default passwords must be changed upon first login
- Should not be a word in any language, slang, dialect, jargon, etc.
- Blank or empty passwords are prohibited
- Passwords must contain at least 3 of the following:
    - At least one capital letter

- o At least one lower case letter
- o At least one number
- o At least one special character (punctuation marks and other symbols)

The CA Web Publishing Service has adopted the password complexity and attributes of the Microsoft Security Template specified in the following table.

Account Policy	User
Password History	12
Maximum Password Age	90 days
Minimum Password Age	1 day
Minimum Password Length	8 chars
Account Lockout Threshold	5 tries
Account Lockout Duration	30 min
Reset Account Lockout Counter After	30 min

4.7 Locked Account

After 5 unsuccessful login attempts, accounts are locked. Accounts automatically unlock after 30 minutes or can be unlocked by site admins.

5   Page Editor Overview

After a successful login, the ***Page Editor*** user interface is displayed. The Page Editor is the default workspace and presents an editable preview or What You See is What You Get (WYSIWYG) copy of your website. Users navigate directly to the content they wish to change, edit in-line, do any other content update tasks then save, submit and publish (Editors and Site Admins only). The Page Editor is designed for individuals who are responsible for making content changes or additions. Here is the layout of the Page Editor:

1. **Ribbon**: User controls such as inserting a component and deleting a page; see 5.1- The Ribbon.
2. **Navigation Bar**: Navigate a site's Content Tree; see 5.2 - The Navigation Bar.
3. **Workflow Bar**: Submit and approve current page; see 10.2 – Submitting Pages.
4. This section is part of the site template, only editable by Site Admins, which includes the banner image, agency logo, and main menu navigation.
5. **Main Content Section**: Main section for content.
6. **Aside Content Section**: Side section for content. Only available in two column layouts; see 9.1 – Editing Page Layout.

5.1   The Ribbon

The **Ribbon** contains a tab menu (**Home | Experience | View**) and icons that represent the various actions, tasks and functions available. Greyed out icons indicate actions that are out of context but will be in context on other pages or after other actions. All tabs contain a **Mode** (**Edit | Preview**) and **Exit** section (**Log Off**).

5.1.1   Home Tab
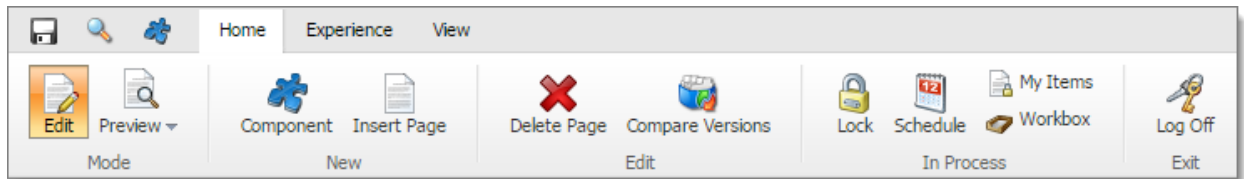
- **Component:** Add a new component; see 8.2 – Adding Components.
- **Insert Page:** Insert a new page as a subpage; see 8.1 – Adding Pages.
- **Delete Page:** Delete current page; see 11.1 – Deleting Pages.
- **Compare Versions:** Compare selected page versions.
- **Lock:** Lock or unlock current page to enable editing.
- **Schedule:** Schedule selected page to be published or unpublished.
- **My Items:** Currently locked items; see 9.5 – Unlocking Content.
- **Workbox:** Displays the workflow process; see 10.4 – The Workbox.

5.1.2   Experience Tab
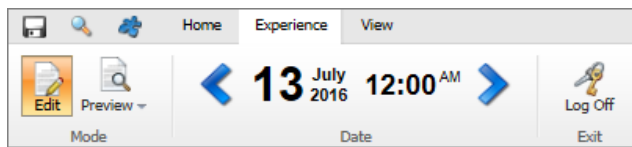
- **Date:** Change date of preview; see 9.6 – Preview Mode.

5.1.3   View Tab
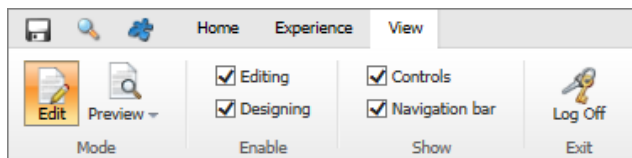
- **Editing:** Allows editing of content items; see 9.3 - Editing Content Items
- **Designing:** Allows adding and editing of components; see 9.2 – Editing Components.
- **Controls:** Displays control boxes around components and content items.
- **Navigation Bar:** Displays the Navigation Bar; see 5.2 – The Navigation Bar.

5.2   The Navigation Bar

The **Navigation bar** is located under the **Ribbon. Navigation bar** must be checked in the **View** tab*.* By default logging in directs users to the CA Web Publishing Services site. Follow these steps to get to your site:

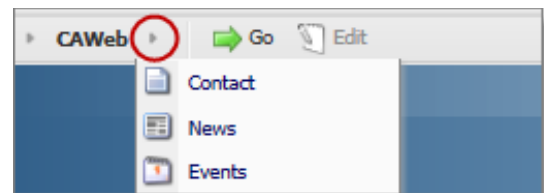**Step 1:** Check the **Navigation bar** check box if not already checked.

Step 2: Click the arrow to the left of **CAWeb** on the navigation bar.

Step 4: Click on your site's name (or page name for sub-pages) from the dropdown menu.

Step 5: Click **Go** to be redirected to your site.
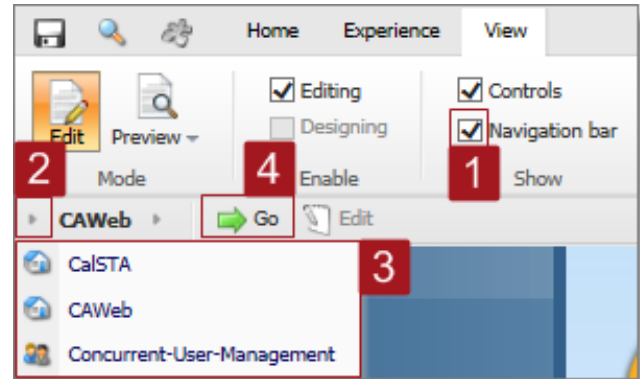
To navigate to sub-pages repeat this process as many times as needed with using the furthest right arrow for step 2.


5.3   Floating Toolbar

A floating toolbar appears whenever a content item, field of a content item, or a component is selected. Depending on what is selected the toolbar will change. All toolbars except the main page container will have a blue arrow to navigate to the item the selected content is a sub-item of.

In this example a contact list item is selected. Notice the word "Item" is in the top left of the floating toolbar.
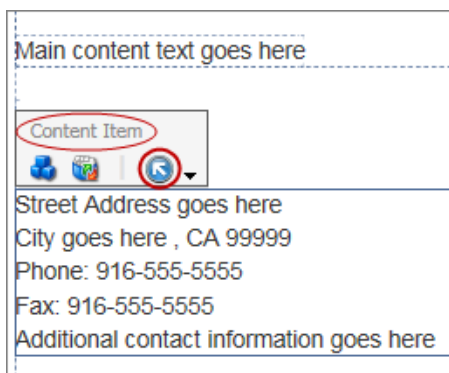
After the blue arrow is clicked, the component containing the item in the last example is selected. Notice the floating toolbar is not the same and the word "Item" has disappeared in the top left of the toolbar.
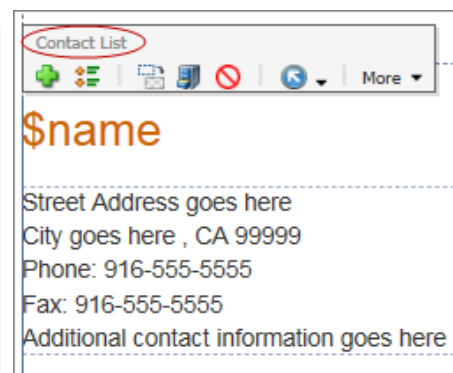
6   Content Creation Overview

6.1   Workflow and Publishing

Content updates appear on the public website only after each modification has been saved, submitted (to the workbox) and approved. This process allows for workflow processing and "draft mode" editing: unfinished items can be worked on over any period of time and queued for later publication by users authorized to publish content. An advanced feature allows for approving and scheduling content for automatic publication.

Content updates are not saved as traditional web pages, but as data records in the CA Web Publishing authoring environment database. The Workbox and the workflow process are covered in greater detail in 10.4 – The Workbox.

6.2   Page Templates

CA Web Publishing provides 10 page templates, which are pre-defined content presentation layouts for specific content categories such as News and Jobs. This feature makes it easier for users to focus on the content rather than stylesheets and HTML code used in traditional web pages. Page templates provide default "placeholder" content which must be replaced with the real content intended for publication.

The following page templates are provided by default in the CA Web Publishing system:

1. General
2. Events
3. News
4. Executive Profile
5. Locations
6. Gallery
7. Jobs
8. Exams
9. Document Resource
10. FAQ

7   Components

7.1   What are Components

All content is stored and displayed using components, from a list of news articles to a gallery of images. CA Web provides predefined components to create reusable content for a website.

Components use content items stored in one location, and can use the same item as many times as desired anywhere on the website. By changing any instance of an item, every instance of an item is altered. The following example shows two different content components on separate pages. They both point to the same content item, "new-content".
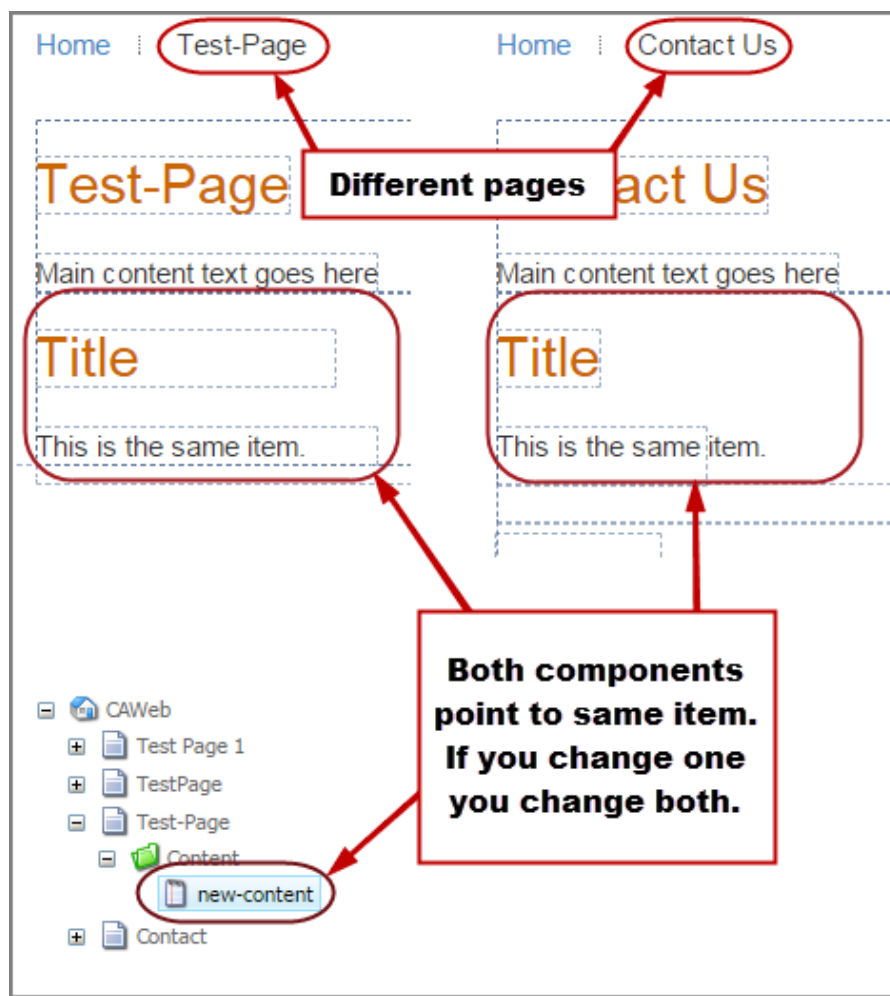
7.2   Component Types

Overall, there are two distinct categories of components; those of **list**, and **single item**. A list component may contain multiple content items, while a single item component holds a single content item. Depending on the section being edited, different components become available and appear in a different order.

1. Contact List
2. Container (Main, Aside only)
3. Gallery
4. Content
5. Event List
6. Event Details (Main, Containers only)
7. News Details (Main, Containers only)
8. News List
9. Executive Profile Details (Main, Containers only)
10. Executive Profile List
11. Executive Banner (Aside, Containers only)
12. Service Location Details (Main, Containers only)
13. Service Location List
14. Job List
15. Job Details (Main, Containers only)
16. Exam List
17. Document Resource List
18. FAQ List
19. Tab Panel
20. Mvc Form (Main, Aside only)
21. Widget

The *Aside Content* section provides the following component types:
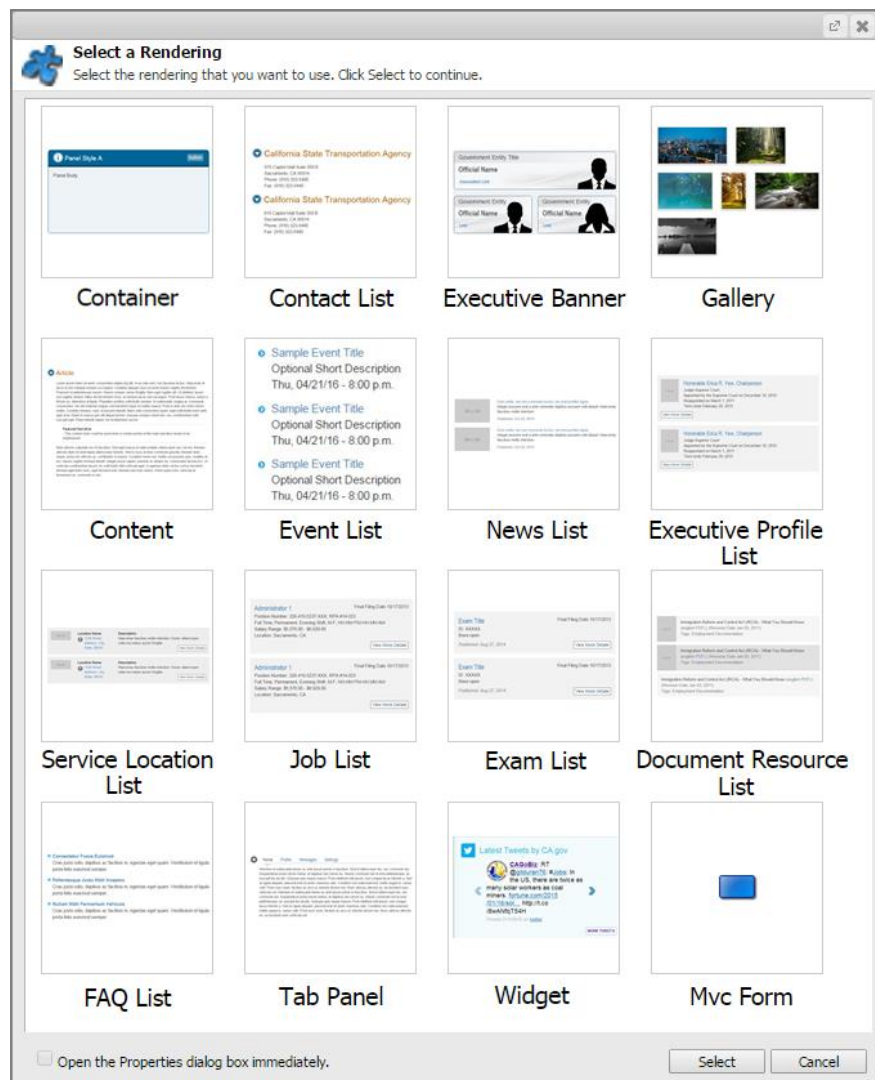
The *Main Content* section provides the following component types:
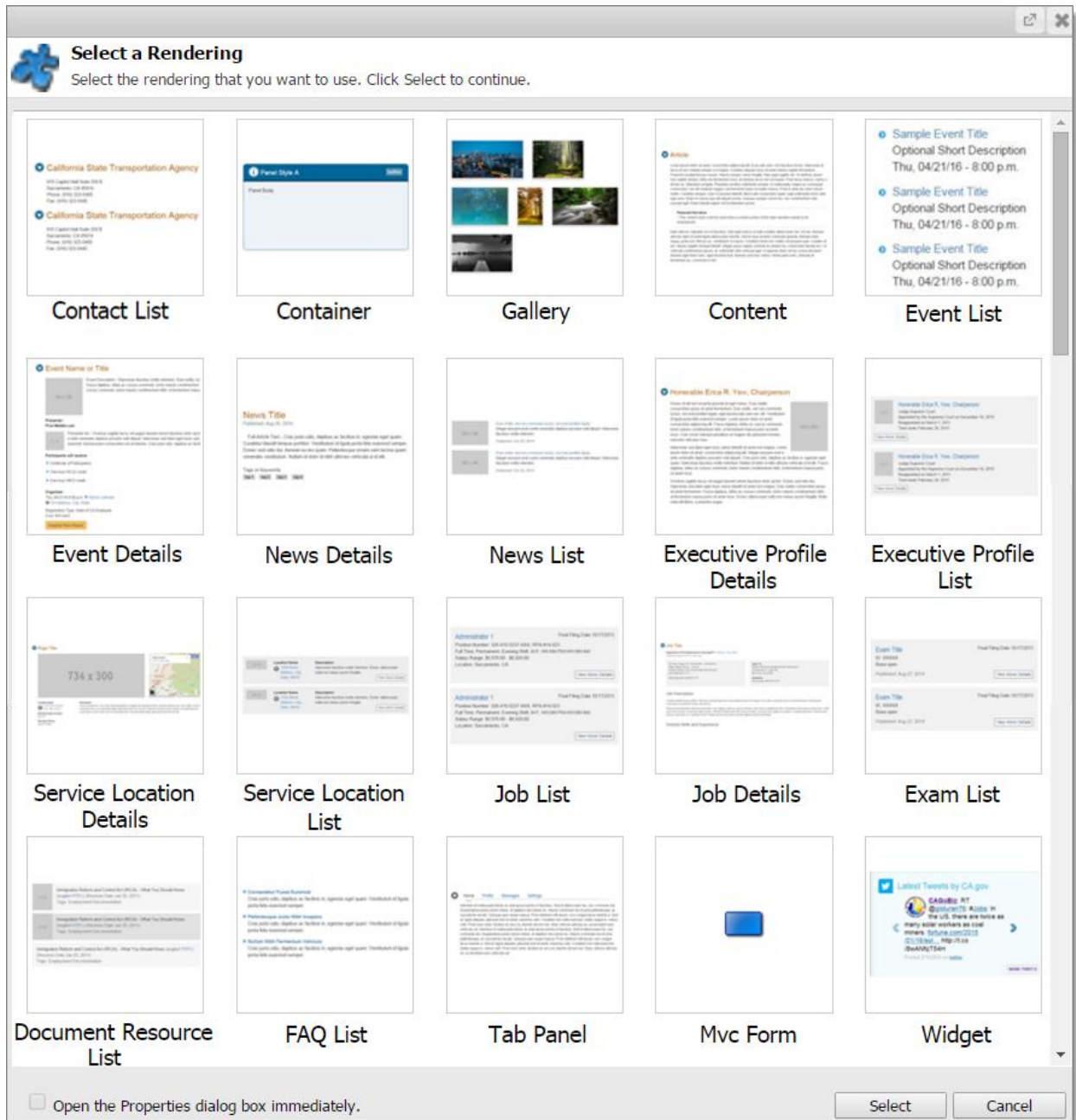
7.3 Content Items

Components simply display content. The content displayed is the ***content item*** associated with it. Content items are stored in a websites ***Content Tree*** and represent the actual data/content that can be reused any number of times on any number of pages.

7.4 Containers

A *container* is a special component type that is used to hold other components. Containers are for displaying, and are not stored in the Content Tree. Use a container to create a border around a piece of content to make it stand out.

A container is very similar to other components, in that it has a component floating toolbar; however, adding content to it will add new components rather than content items (see 8.2 – Adding Components).

The example below shows the relationship between a *Container, Component,* and *Content Item*. A container holds any number of components. Each component placed inside the container may hold one or more content items. (List types, like the contact list in the example below, can have more than one item.). Content items are associated with a component and may be repeated in any number of components.
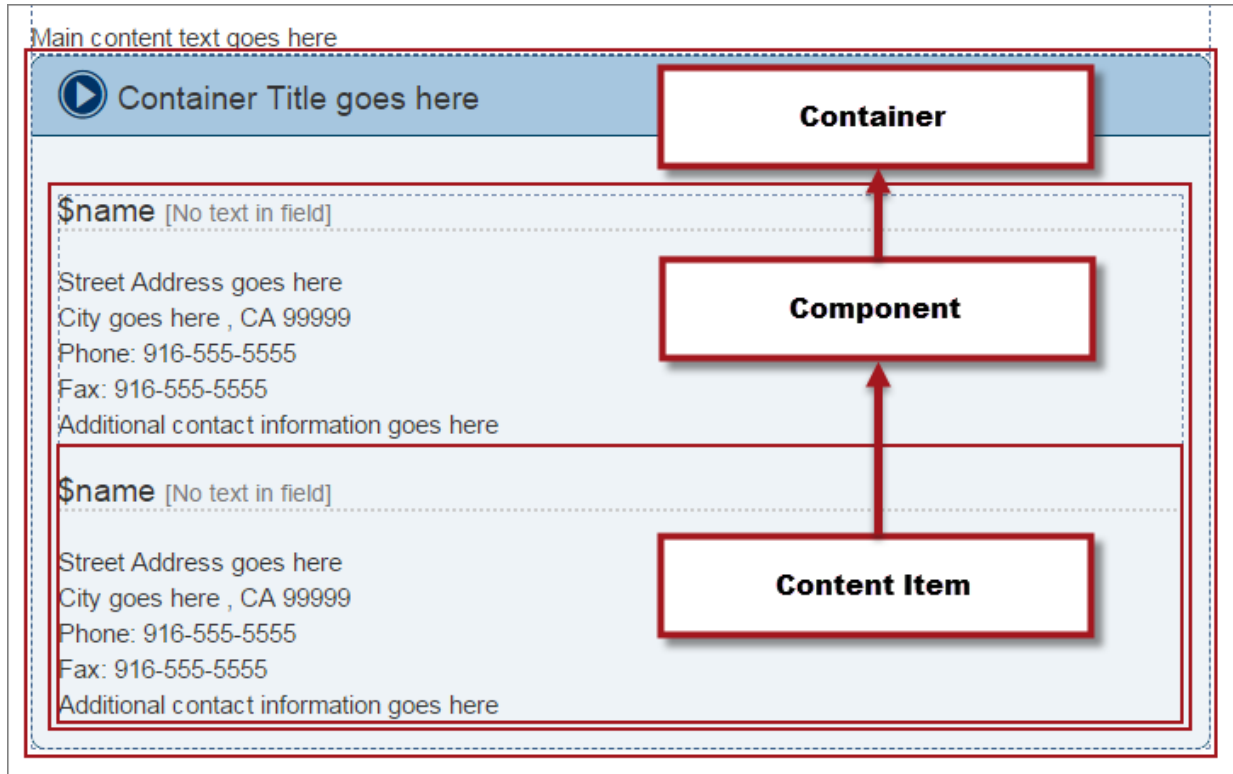
8   Adding Content

8.1   Adding Pages

Navigate (see 5.2 – The Navigation Bar) to a page to add a subpage to. When creating a new page, it will be created as a subpage of the currently selected page. In the Example below, the current page is "CAWeb/". If the new page is called "Test-Page", it will be located in the Content Tree at "CAWeb/Test-Page".

Step 1: Click *Insert Page* in the *Home* tab.

In this example the new page will become a subpage of "CAWeb" as indicated on the Navigation Bar.
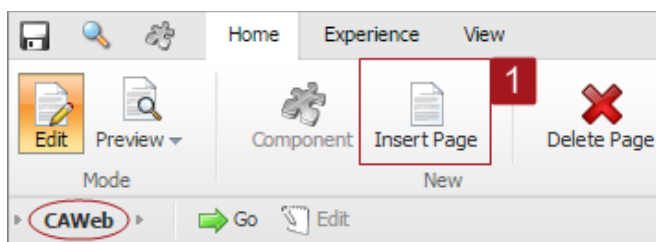
Step 2: Select a page type from the list of templates.

Step 3: Type in an *Item Name*.

Step 4: Click *Insert* to add the new page.

Some page types, such as the News Page and Events Page, create an RSS feed associated with the page as a sub-item of the page.
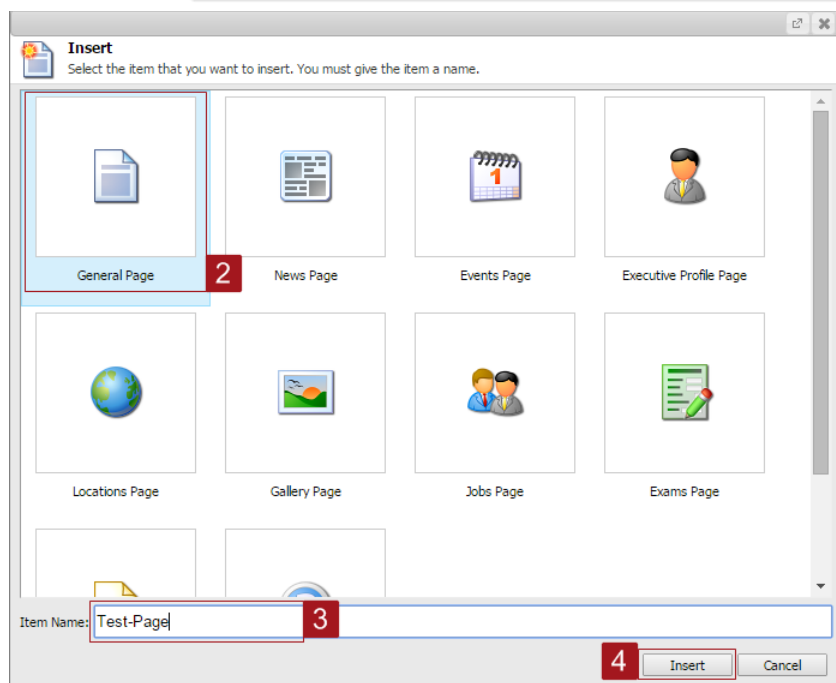
Item Name becomes the name for the browser tab, breadcrumb, and default page title (which can be changed); it will be the page name URL and can only be changed by the Site Admin in the Content Editor.

> ⚠️ It is recommended using short and concise names with hyphens instead of spaces or underscores. Creating long page names will increase the length of the URL and breadcrumb.
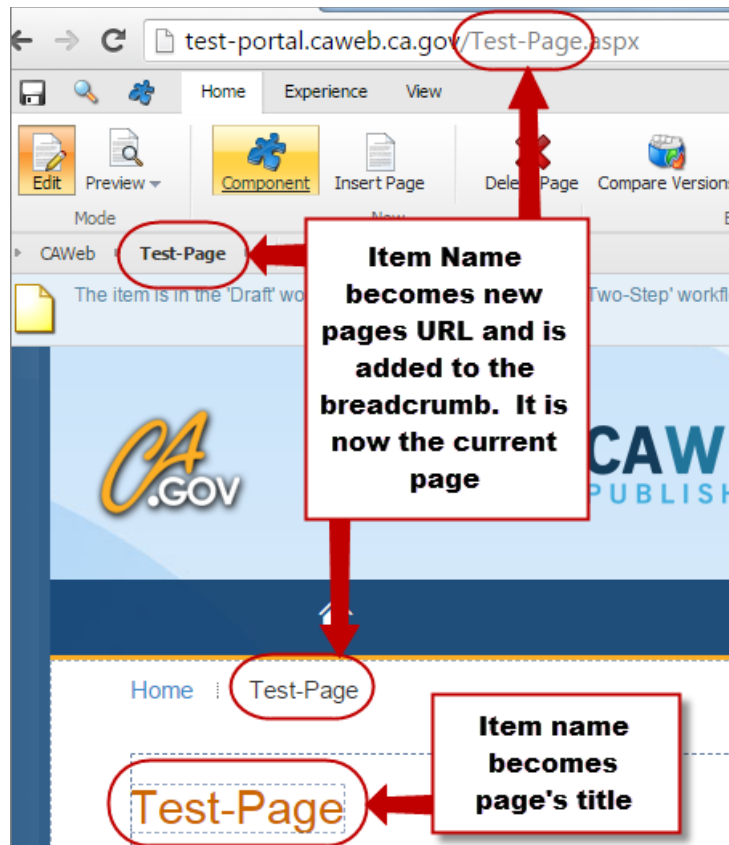
8.2   Adding Components

Navigate (see [5.2 – The Navigation Bar](#)) to a page to add content to. **Lock** the page if it is not already locked. Make sure the **Designing** button is checked and in **Edit** mode. To add content to a page components are used.

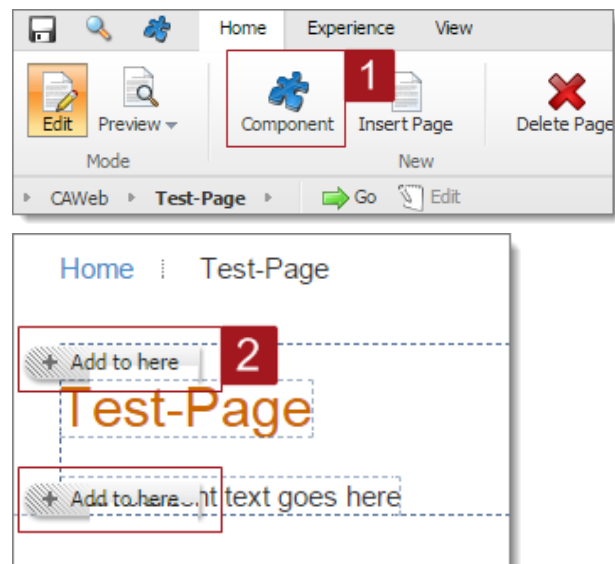**Step 1:** Click the **Component** button in the **Home** tab.

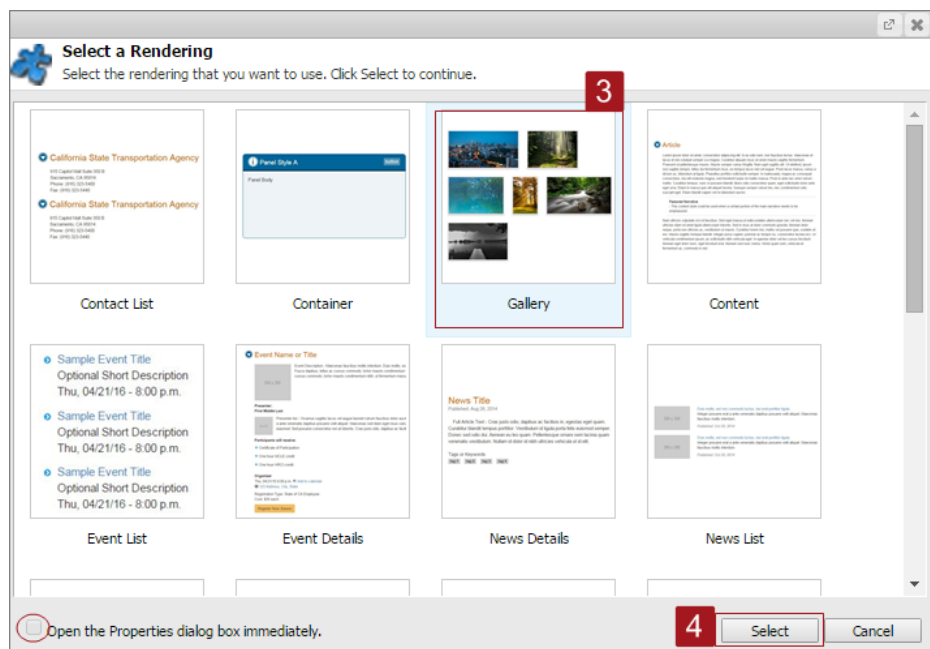**Step 2:** Select **Add to here** above or below the location to add to.

Add to here will be at the top of every component, and will push down the component below it.

Step 3: Select the component type to add.

Step 4: Click **Select** to add the selected component.

There is a checkbox to automatically open the properties box.

List type components (News List, Event List, Contact List, etc.) should only be used to refer to an associated list page (News Page for a News List, etc) or on the associated list page itself. To create new lists, create a new page by following 8.1 – Adding Pages and use the News Page.

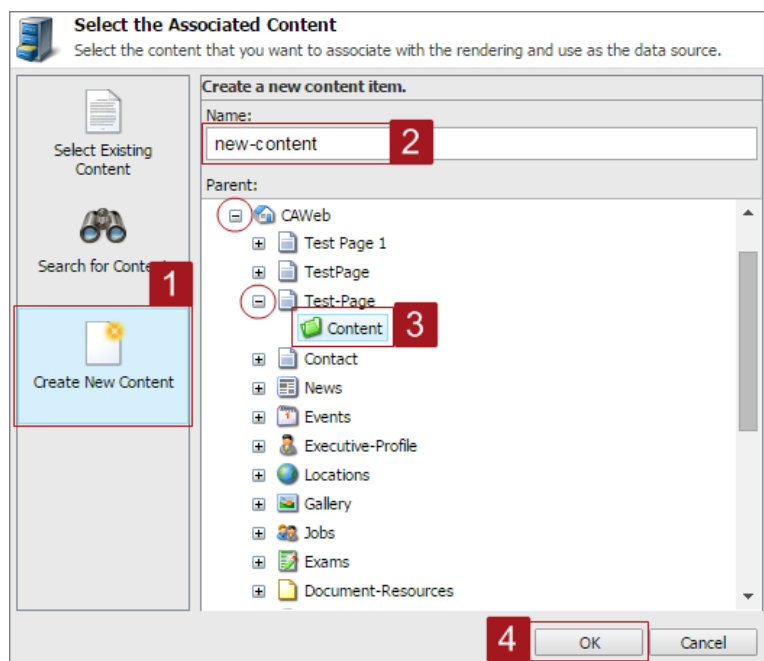## 8.3   Adding Content Items

8.3.1   Adding New Content Items

This section is a continuation of 8.2 - Adding Components.

Step 1: Click *Create New Content*.

Step 2: Type in a *Name.*

Step 3: Select the location to store the content.

Click the "+" next to sections to show their subsections. The location of content is where it is stored for pages to access, not where it is displayed. In the example the location is "CAWeb/Test-Page/Content". Items should be placed in their respective folders, for example News Items will be in a News-

Items folder.
Step 4: Click **OK** to add the new content to the page.

Click the **Save** icon in the top left of the **Ribbon** (or press Ctrl+S) to put the item in "Draft" state.

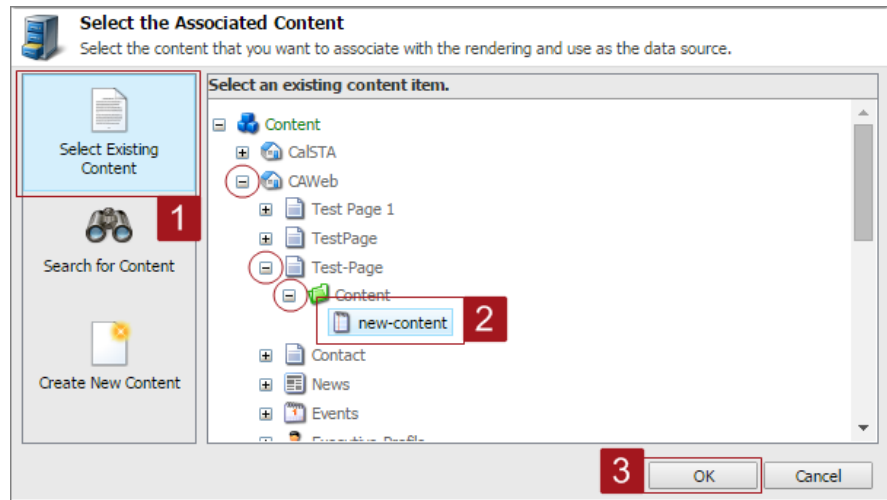### 8.3.2   Adding Existing Content Items

This section is a continuation of 8.2 - Adding Components.

Step 1: Click **Select Existing Content**.

Step 2: Select the content name.

Step 3: Click **OK** to associate the content to the component.

Click the **Save** icon in the top left of the **Ribbon** (or press Ctrl+S) to put the item in "Draft" state.

8.3.3   Adding List Items

Step 1: Click on the List type Component.

Step 2: Click the far left green cross on the floating toolbar.

Step 3: Select the Content Item type to add.

Select the same type of item as the list being added to. The example inserts a **News Article** as it is being added to a **News List.**

Step 4: Enter an **Item Name.**

Step 5: Click **Insert.**

Step 6: Follow steps 1 through
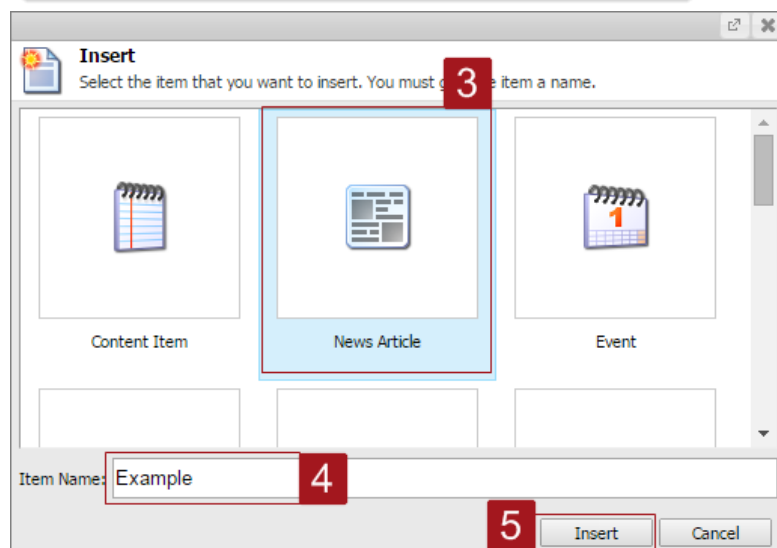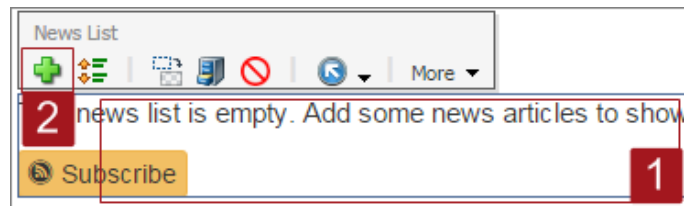
5 for additional items.

9   Editing Content

Navigate (see 5.2 – The Navigation Bar) to a page that will be edited. *Lock* the page if it is not already locked. Make sure the *Designing* button is checked and in *Edit* mode*.* Click the *Save* icon in the top left of the *Ribbon* (or press Ctrl+S) to save any changes. All changes must follow the workflow process as described in 10 – Publishing Content before they appear on the production site.

9.1   Editing Page Layout

Pages have a *Two Column* layout by default. Within the Two Column layout are the *Main Content* and *Aside Content* sections. A *One Column* layout consists only of the *Main Content* section.

To change the page's layout:

Step 1: Select the *Main Content* section. Refer to item 5 in the image of 5 – Page Editor Overview.

If unable to select the Main Content section, click the blue arrow on the floating toolbar of the item selected until there is no longer a blue arrow.

Step 2: Click the *Replace with another component* button, represented as a green and red arrow, in the floating toolbar.

Step 3: Select the layout. Depending upon the current layout the options will change.

Step 4: Click *Select.*
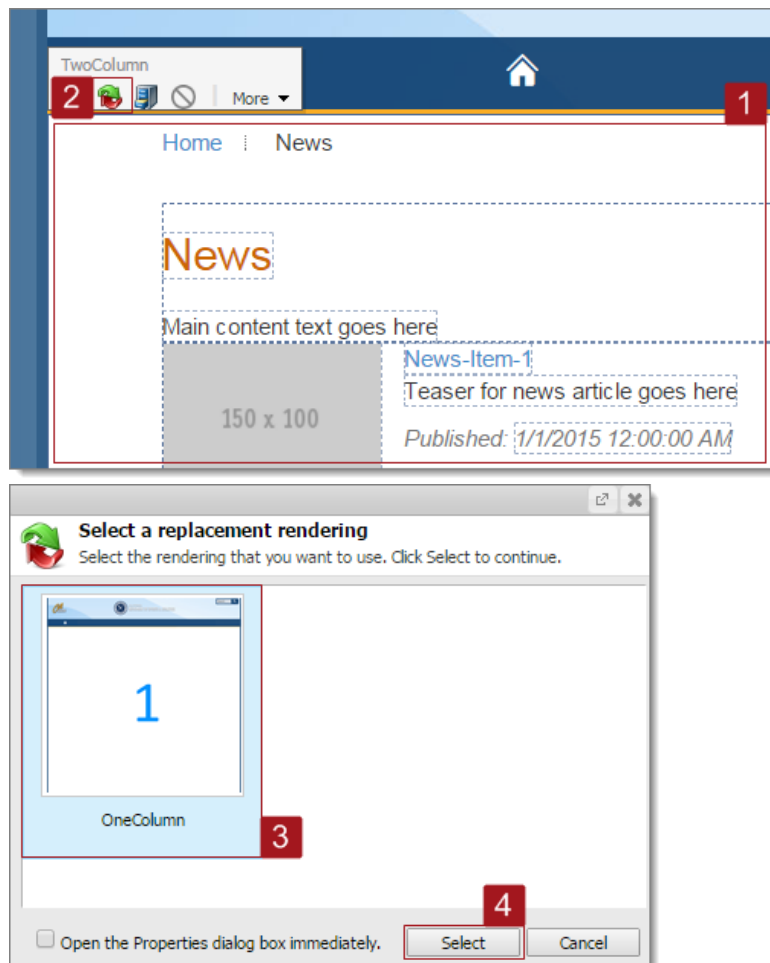
9.2   Editing Components

Depending on the type of component being edited the menu will be slightly different. Menus for a list type component menu have two additional buttons located on the left to sort and add new items to the list. There is also the special case of **containers** (see 7.4 - Containers).

Make sure the **Designing** button is checked in the **View** tab.

Step 1: Click on the component.

The easiest place, if it is a list like the example, is in between the content items. If only able to click on the content item, and not the component itself, use the blue arrow to navigate to the component. Note the floating toolbar does not say "Item".

Step 2: Click the dropdown **More** button.

Step 3: Click the **Edit the Components and Properties** button.

Step 4: Fill in field values.

Many fields contain default values. Mandatory fields cannot be blank. A scrollbar on the right side indicates more fields below.

The red bar to the left of a field, such as **Title** in the example, indicates an empty required field.

Step 5: Click **OK.** The items changes are now entered.
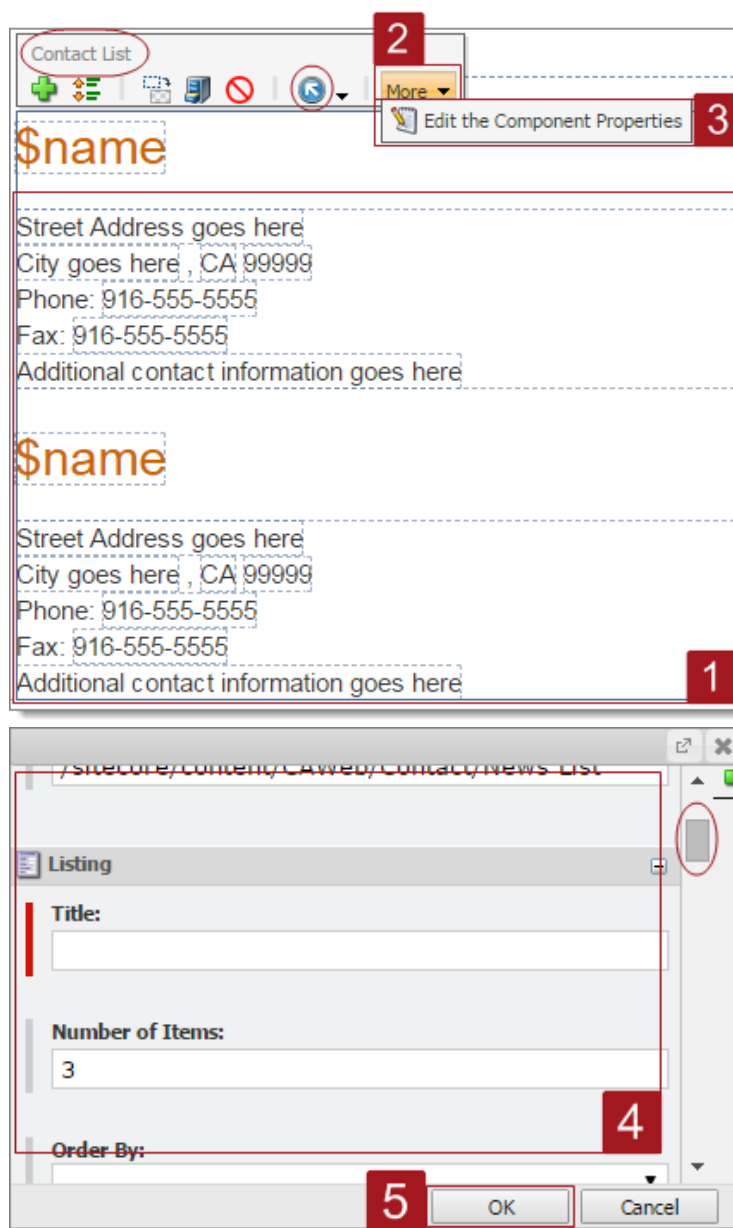
9.2.1   Filtering Lists

Filtering a list displays specific items based off the Tags associated with them.

This section is a continuation of Step 4 in 9.2 – Editing Components.

Step 1: Select one or more tags from the *Agency Tags* and *Global Tags* fields.

Step 2: Click the blue arrow. Tags currently in use are displayed in the *Selected* box.

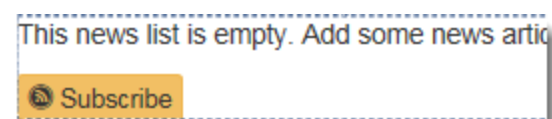**Step 3:** Click *OK.* This filters the list according to any Tags selected in Step 2.
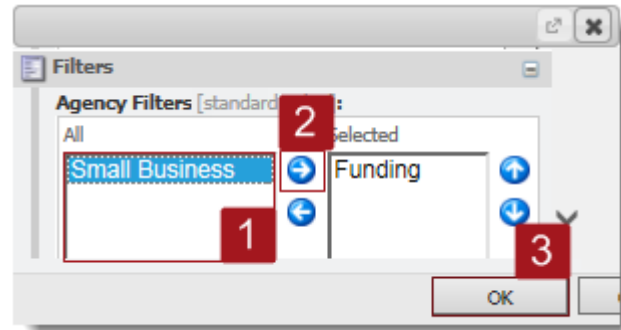
This example shows a news list with a news item, *News-Item-1*, with the Tag being filtered. Here is the list before it's filtered:

Only items with the Tags being filtered are displayed. *News-Item-2* did not have the selected filter, and now is hidden.

If this message appears instead of the filtered items, make sure the *Date* in the *Experience* tab of the *Ribbon* is set to the current date and time or later.

The top toolbar row shows a variety of buttons for functions such as formatting, creating hyperlinks, and creating tables.

Step 3: Click *Accept* to save any changes and return to the "Data" window. Click *OK* inside that window to apply any changes.
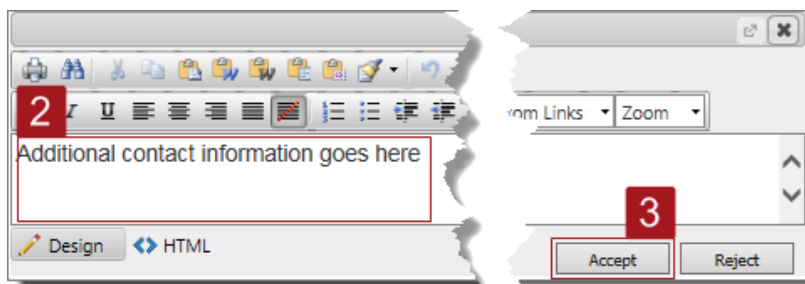
### 9.3.1.1   Uploading and Inserting Documents and Media

This section is a continuation of Step 2 in 9.3.1 – Editing Main Content.

For linking documents, first select the text that will become the hyperlink.

Step 1: Click the *Insert Sitecore Link* button.

This example follows the process for document resources. For media items click the *Insert Sitecore Media* button. The windows are slightly different than the examples but the process is the same.

Step 2: Click the *Media Items* tab. For uploading a media item the tab will be named *Media Library.*
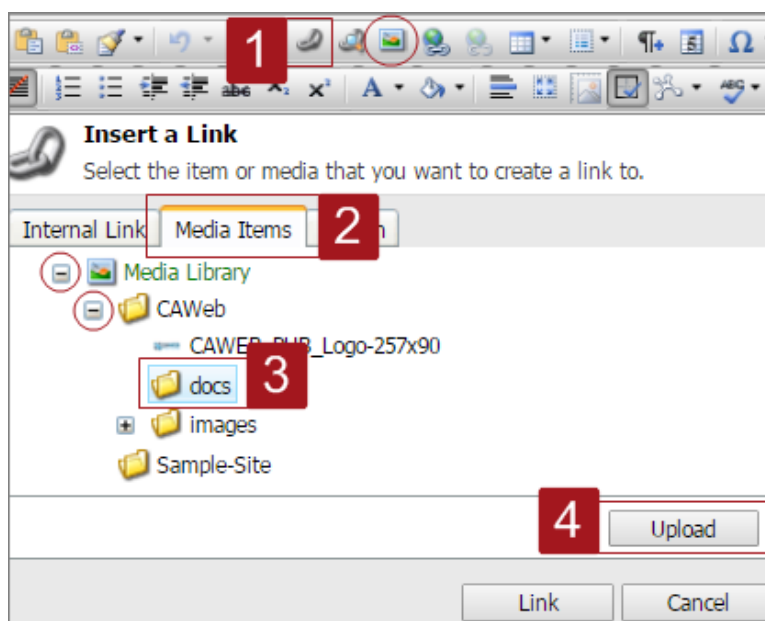
Step 3: Select the folder to upload to.

Step 4: Click *Upload* to bring up the "Upload a File" window. If inserting an item that has already been uploaded click *Link* and be returned to the editor.
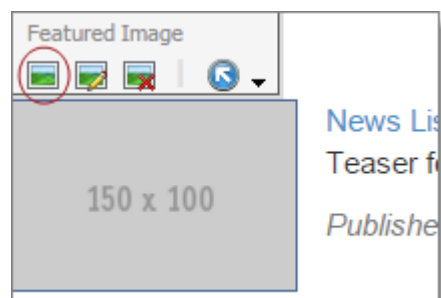
An alternative for changing images that already exist; instead of Step 1, click the *Choose an Image* button on an images floating toolbar.

Step 5: Click *Browse...* and select a file to upload.
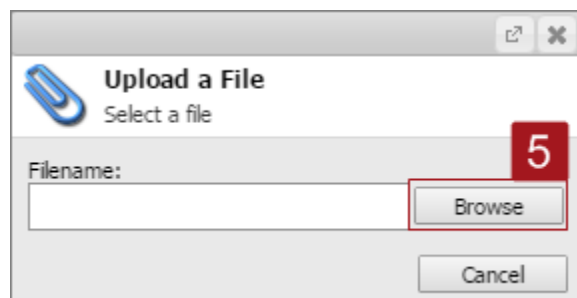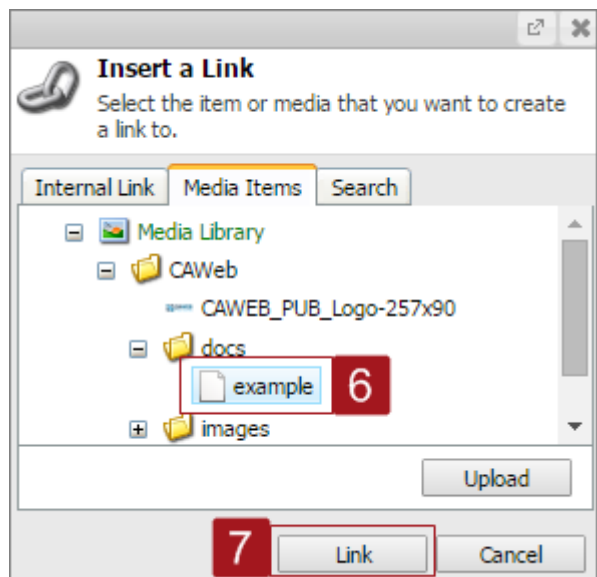
The item is now uploaded. To insert the item as an image or link:

Step 6: Select the item if not already selected.

Step 7: Click *Link*.

9.3.2   Adding Tags

Tags are keywords used for meta-data and filtering items in list type components. Tags allow a user to search for specific items; more importantly they provide search engines data to produce robust search result formatting. There are two types of Tags available - Global Tags (Generic predefined keywords) and Agency Tags (Defined by the Site Admin).

This section is a continuation of Step 3 in <u>9.3 – Editing Content Items.</u>

Step 1: Select one or more tags from the *Agency Tags* and *Global Tags* fields.

Step 2: Click the blue arrow. Tags currently in use are displayed in the *Selected* box.

Step 3: Click *OK.*
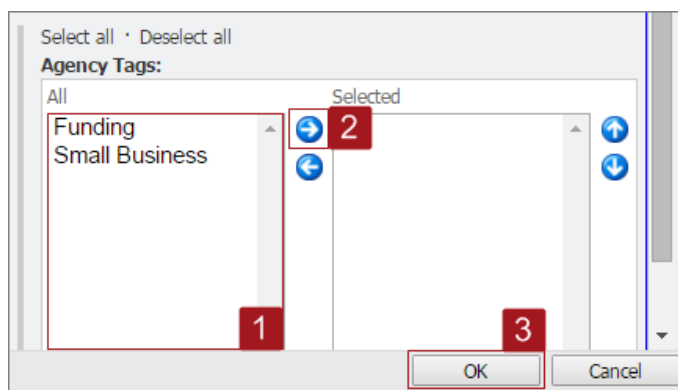
It is recommended to add Tags to every Content Item. For filtering a list of items, such as a news list, follow <u>9.2.1 – Filtering Lists</u>.
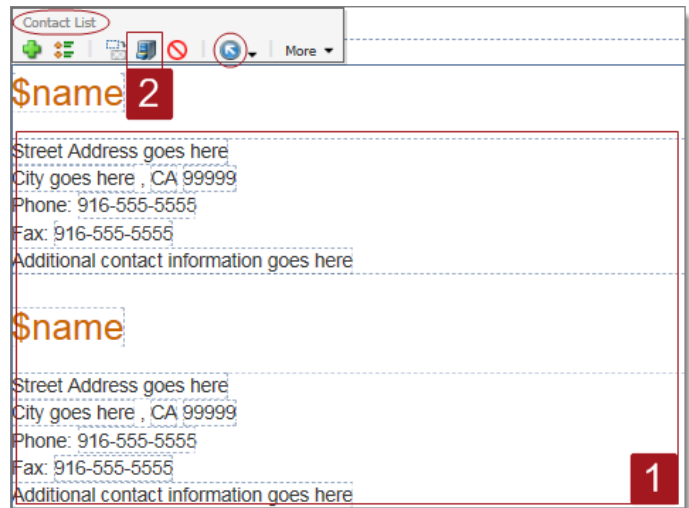
9.4   Associating Content Items

Components are only used to display content items. It is possible to switch which content item will be displayed, without having to remove the component, by using the *Set associated content* button.

Make sure the **Designing** button is checked in the **View** tab.

Step 1: Click anywhere on the component.

The easiest place, if it is a list like the example, is in between the content items. If only able to click on the content item, and not the component itself, use the blue arrow to navigate to the component. Note the floating toolbar does not say "Item".

Step 2: Click **Set associated content** on the floating toolbar.

To **associate a new content item,** follow 8.3.1 - Adding New Content Items. Only use this method for new single type items. For new list type items (News List, Events list, etc) create a new page by following 8.1 – Adding Pages.

To **associate an existing content item,** follow 8.3.2 - Adding Existing Content Items.

9.5   Unlocking Content

Content is automatically locked after making edits, even if the **Lock** button has not been pressed. It is good practice to unlock all locked content at the end of a session; allowing other users to make changes to that item.

Step 1: Click **My Items**.

This will open a window containing all locked items. Notice there is a number next to it indicating how many items are locked.

Step 2: Click **Unlock All.**

Step 3: Click **Close** to close the window.
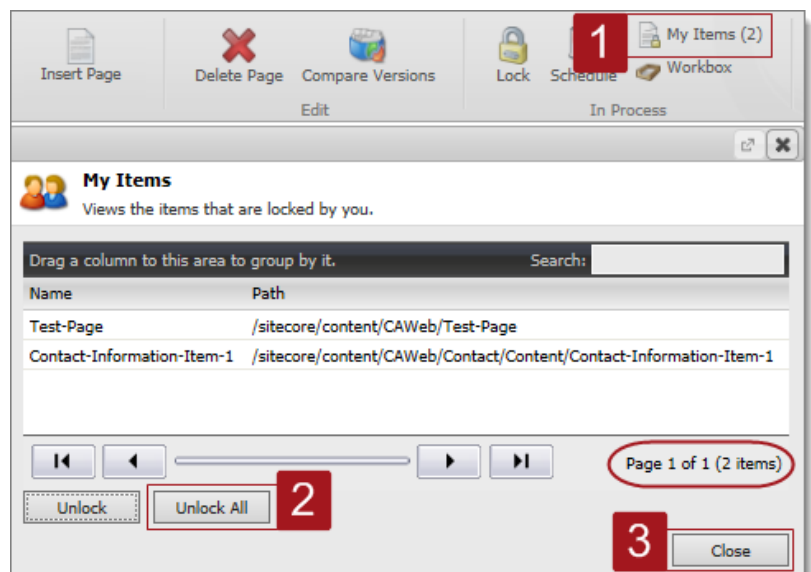
This will unlock any locked content, allowing other users the ability to edit that content. There may be multiple pages of locked items.

9.6   Preview Mode

The majority of this document uses the *Edit* mode for adding, editing, deleting, and publishing content. To preview a page before it is published use the *Preview* mode. This mode removes all editing functionality and displays how the site will look to users.

Step 1: Click *Preview* from any tab on the *Ribbon*.

The *Experience* tab will now be in focus.

Step 2: Set the date/ time to current or later.

This can effect which version of the document is being viewed. If an item has not been published yet it will not appear in this mode.
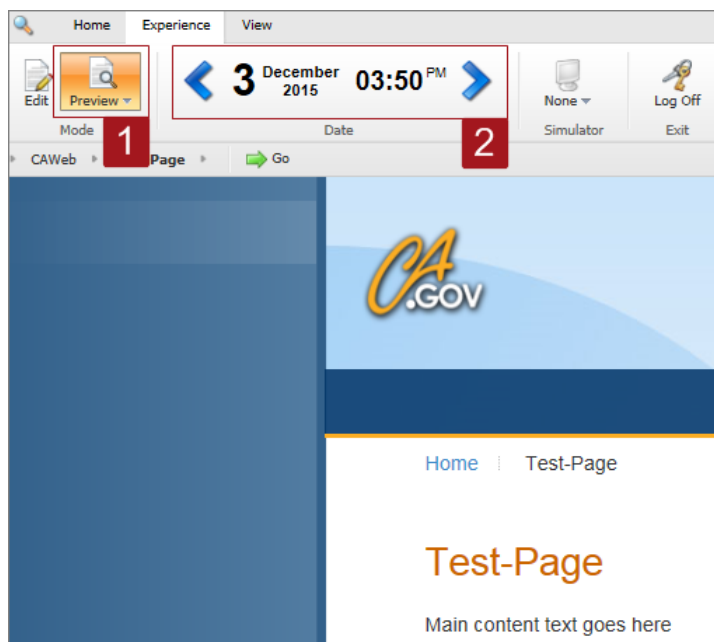
10 Publishing Content

Navigate (see 5.2 – The Navigation Bar) to the page that will be published. Make sure the page is in *Edit* mode.

CA Web Publishing offers a two-step workflow approval process. There are three states for content: Draft, Awaiting-Approval, and Published. Content is put in the "Draft" workflow state when it is first created.

10.1 Saving Content

Content Items only appear in the workflow process as "Draft" state after they have been saved. Each time an item is altered a save is required.

To save an item click the *Save* button in the top left of the *Ribbon*.

An alternative is using Ctrl+S.
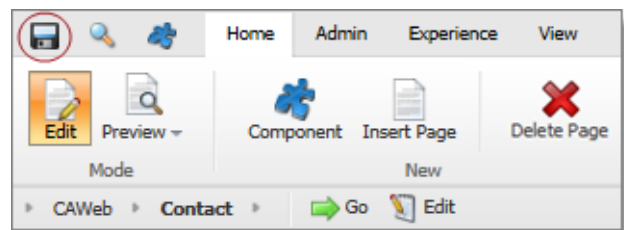
10.2 Submitting Pages

Submitting an item, such as a page, image, or any other content item, must be performed each time a change is made. Submitting pages for approval can be done using the *Workflow Bar* under the *Ribbon*, or by using the *Workbox* (see 10.4 – The Workbox).

To submit a page click *Submit* in the *Workflow Bar*. Submitted items are in the *Awaiting-Approval* workflow state.
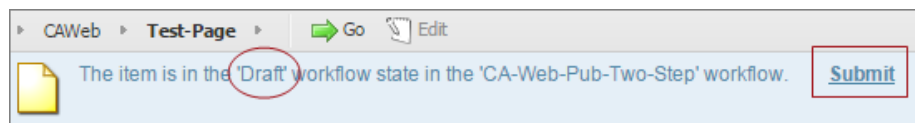
Submitting a page only publishes the Components and the default Content Item on the current page. Content Items that are not the page's default will require submission through the *Workbox*, or by navigating to each item and clicking *Submit* on the *Workflow Bar.*

10.3 Approving Pages

Approving an item, such as a page, image, or any other content item, must be performed each time an item is submitted for the change to appear on the live web site. Approve or reject items by clicking on the *Workbox* (see 10.4 – The Workbox). Approved content is published to the live site and removed from the workbox. Rejected content is returned to the user who submitted it as a Draft workflow state item.

Reject returns the item as a Draft state workflow item to the user who submitted it.

Important:

- Only use the *Workbox* for submitting and approving content publishing at this time.
- Updates to the Home page of the site can only be done via the "Publish" button on the "Home" tab of the top ribbon menu.

10.4 The Workbox

The *Workbox* is where all content is placed while it is in the "Draft" or "Awaiting-Approval" state. Each version of content saved, be it the entire page, or the individual content inside of it, will be located in the "Draft" tab. Once *submitted* and before it is *published*, it will move to the "Awaiting-Approval" tab.

10.4.1 Workbox Submittal

The *Workbox* provides three methods for submitting content. The following example shows single item submission.
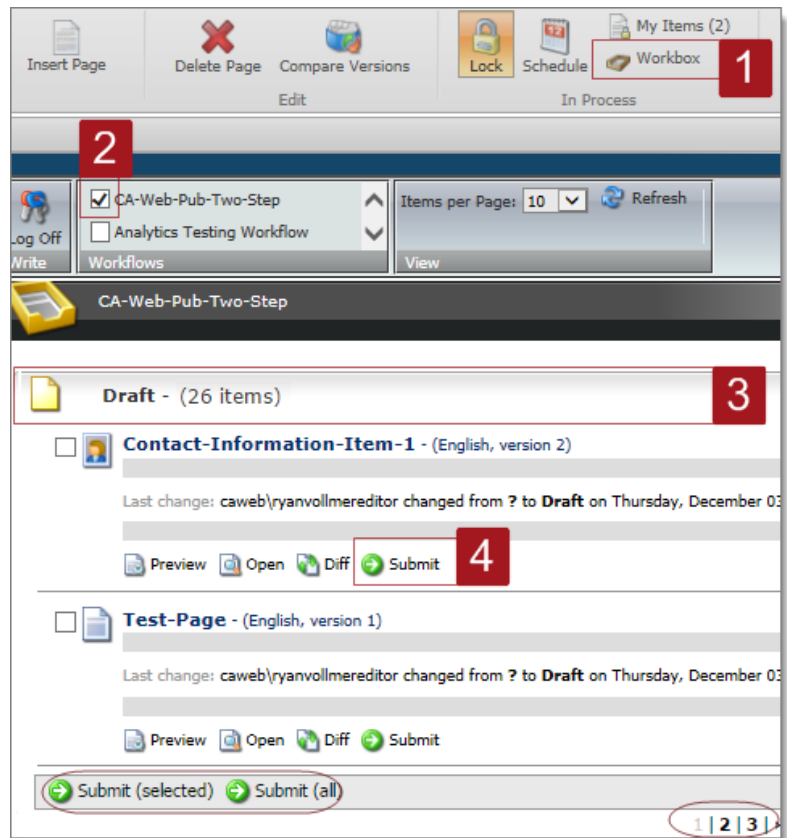
Step 1: Click *Workbox* on the *Home* tab.

Step 2: Check the *CA-Web-Pub-Two-Step* check box, if it's not already checked.

Step 3: Click anywhere on the *Draft* tab.

A list of items in the Draft state is displayed. For multiple pages of items, a scroll bar and numbers in the bottom right will appear.

Step 4: For single item submission, click *Submit* at the bottom of the item being submitted.

For submitting all items, click *Submit (all)*. This will submit all items currently in draft state, even ones on other pages if there are multiple pages of draft state items.

For submitting multiple specific items, check the box to the left of any items to submit and click *Submit (selected)*.

Click the X in the top right corner to close the workbox window.

10.4.2 Workbox Approval

Once submitted, content is ready to be *rejected* back to draft state or *approved* for publishing. There are three ways to approve or reject content using the workbox. The following example will use the single item method.

> Authors do not have permission to approve submissions for publication. Only Site Administrators and Editors can approve content to be published.
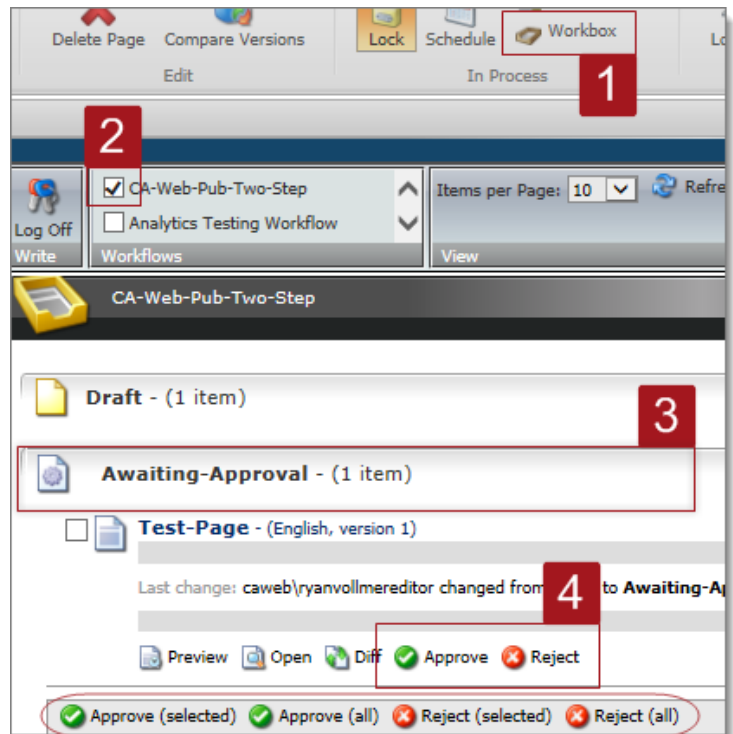
Step 1: Click **Workbox** on the **Home** tab.

Step 2: Check the **CA-Web-Pub-Two-Step** check box, if it's not already checked.

Step 3: Click anywhere on the **Draft** tab.

This will display a list of items in the Draft state. Notice it shows how many items are in this state, there may be more than one page.

Step 4: For single item approval or rejection, click *Approve* or *Reject*.

Approving an item will publish it, applying the change to the live website. The item will no longer reside in the Workbox. Rejecting an item will return it to "Draft" state.

For approving or rejecting all items, click *Approve (all)* or *Reject (all)*.

For approving or rejecting multiple specific items, check the box next to the name of any items approve or reject and click *Approve (all)* or *Reject (all)*.

Click the X in the top right corner to close the Workbox window.

11 Deleting Content

Navigate (see 5.2 – The Navigation Bar) to the page or content to delete. **Lock** the page if it is not already locked. Make sure the page is in **Edit** mode*.*

Deleting content will instantly remove it from Sitecore's editor; but the deleted content will remain on the live site until the **Nightly Smart Publish or the "Publish" button on the**

"Home" tab of the ribbon menu is utilized. Otherwise, the content will still be accessible on the production live site by typing in its URL.

11.1 Deleting Pages

Performing this action will delete any sub-items associated with the page. Any references to the deleted sub-items will be removed. Ensure the items being deleted are no longer wanted anywhere on the site before perform this action. We do not recommend deleting a page if it has previously been published. To remove a page that has been previously published we recommend you unpublish the page rather than deleting it. Note that the unpublish feature works in the same manner and will unpublish everything under the current page.

Step 1: Click *Delete Page* in the *Home* tab.

Step 2: Click *OK*.

Step 3: Select the *Remove Links* radio button.

This will break the mentioned link to this current item. Alternatively, link the item to another item using the *Link to another item* radio button.

Step 4: Click *Continue*.

Step 5: Click *Continue* again.

The page will now be deleted and redirect the user to its parent's page. All sub-items of the page will also be deleted.
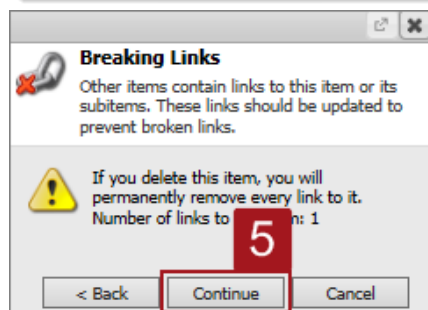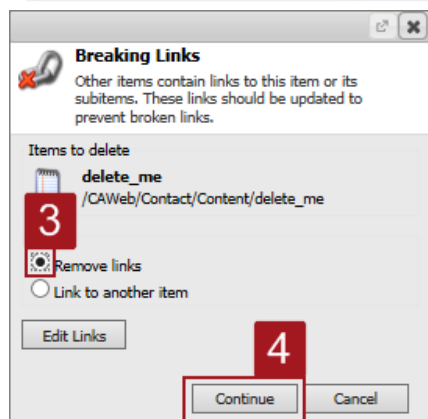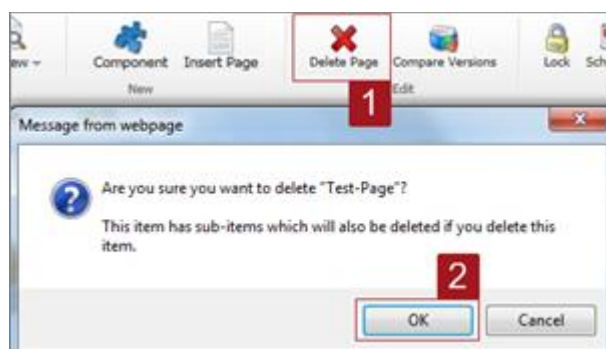
11.2 Removing Components

Removing a component does not delete anything on the **Content Tree**, and will not impact any other content. This process removes the relationship between the component and the content item associated with it, removing it from the page.

Step 1: Click on the component.

The easiest place, if it is a list like the example, is in between the content items. If only able to click on the content item, and not the component itself, use the blue arrow to navigate to the component. Note the floating toolbar does not say "Item".

Step 2: Click **Remove Component.**
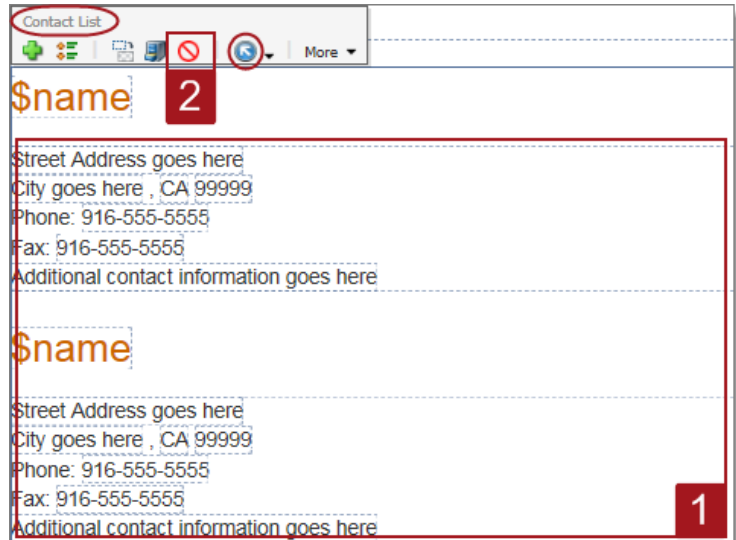
The component will be removed from the page. The content items that were inside of it will still exist inside the Content Tree, allowing any other content that uses these items to not be deleted.

11.3 Deleting Content Items

When deleting a content item it will be removed from the **Content Tree**. As with editing a content item, this will affect any other instance of the content item. This process follows the same method as deleting a page, however generally requires more navigation to the item.

Performing this action will delete any references to the item. Ensure the item being deleted is no longer wanted anywhere on the site before perform this action.

This example will delete an **Event Item** named "event 1" from an **Event List**. The Event List is stored on an **Events Page** named "events_page". The URI of the item in this example is "CAWeb/events_page/Events-Items/event 1".

Step 1: Navigate to the page of the item to delete. Follow 5.2 – The Navigation Bar for more help.

Step 2: Click *Go* to be redirected to the item's page.

Step 3: Delete the page. Follow 11.1 – Deleting Pages for help.
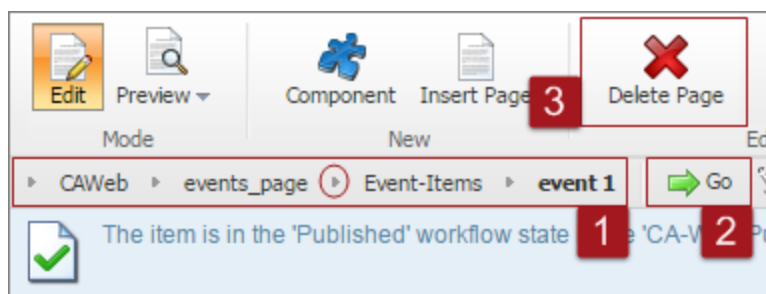
Note as this is an Event Item it is stored in the Event-Items folder that was automatically generated in the Content Tree when the Events Page was created.